



Arts Insight

The National Arts Engagement Survey 2021

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RESEARCH
& INSIGHT





- **The purpose of Arts Insights is to establish rigorous statistical measures on the Irish public's attitudes and behaviours relating to arts and culture;** and how these corresponds with other consumer and lifestyle behaviours.
- The 2021 research builds off the findings from 2018, 2019 & 2020.
- **Nationally representative sample of 1,000 adults ages 16+:**
 - Quota controlled in terms of gender, age, region and area.
 - Fieldwork was conducted in October/ November 2021.
 - All interviewing was conducted face to face.
 - In addition an online booster survey of new nationals was conducted.
 - In total, 1183 interviews were completed for Arts Insight 2021

Sample Profile

Base: Adults aged 16+ n – 1,183



		2021 %
Gender	Male	49
	Female	51
Age	<34	32
	35-49	29
	50+	40
Social Class	ABC1F	47
	C2DEF	53

		2021 %
Region	Dublin	29
	ROL	26
	Munster	27
	Conn/Ulster	18
Area	Urban	66
	Rural	34
Nationality	Nationals	83
	Non Nationals	17

Arts Insight 2021



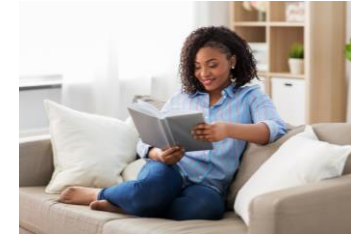
Arts attendance



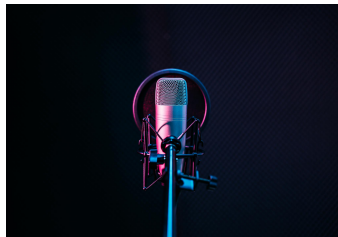
Digital Arts Engagement



Participating in the Arts



Reading for pleasure



Music



Attitudes towards Arts



Summary and Conclusions



Arts attendance

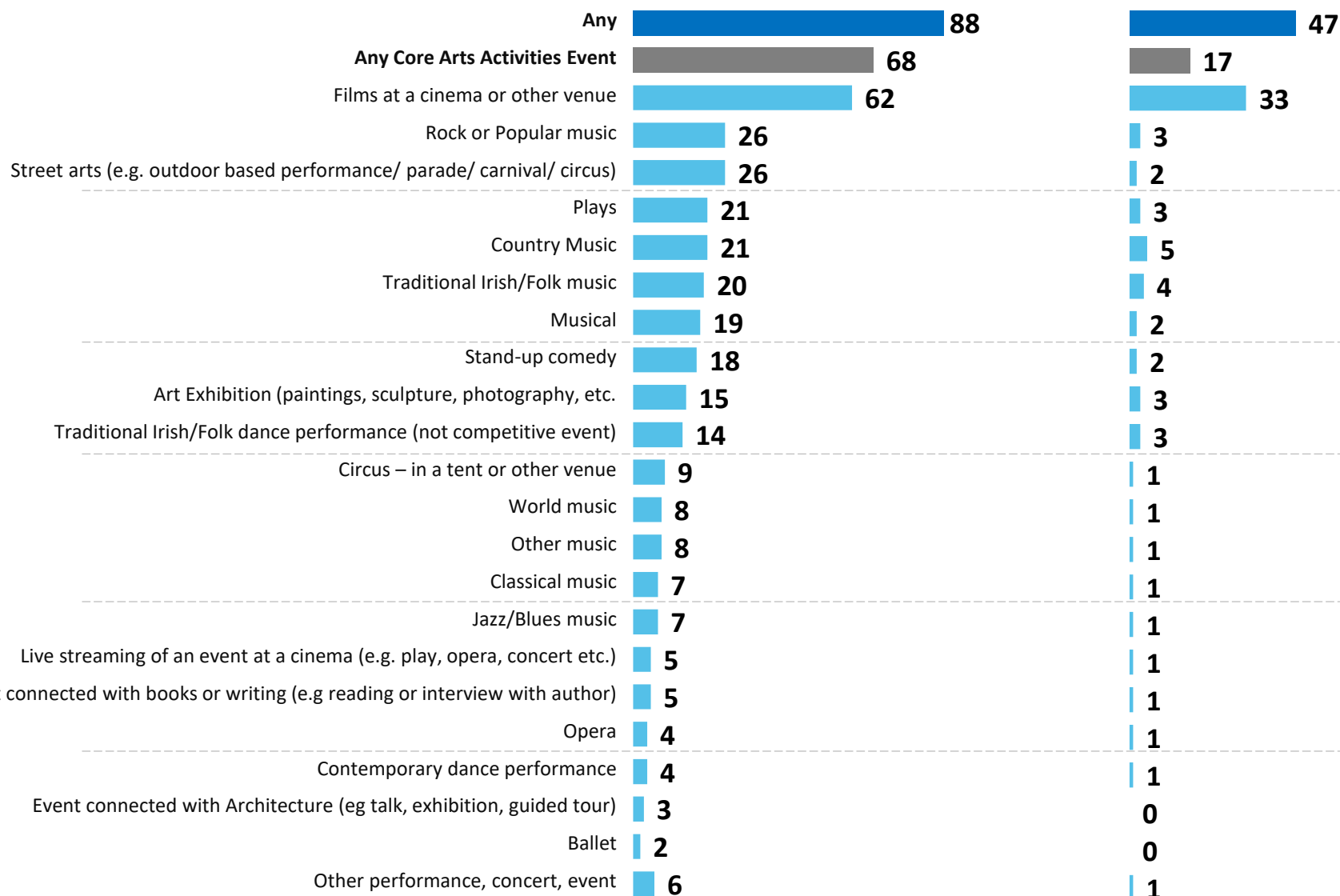
Arts Insight 2021

Arts Attendance

Base: Adults aged 16+ n – 1,183

Annual attendance pre - Covid %

Attended 'Since Reopening' %



Q.2 Thinking back now to before the start of the Covid 19 crisis in Ireland, which if any of the following events would you attend at least once a year outside the home?

Q.3 And which, if any, of these events, have you gone to since re-opening?



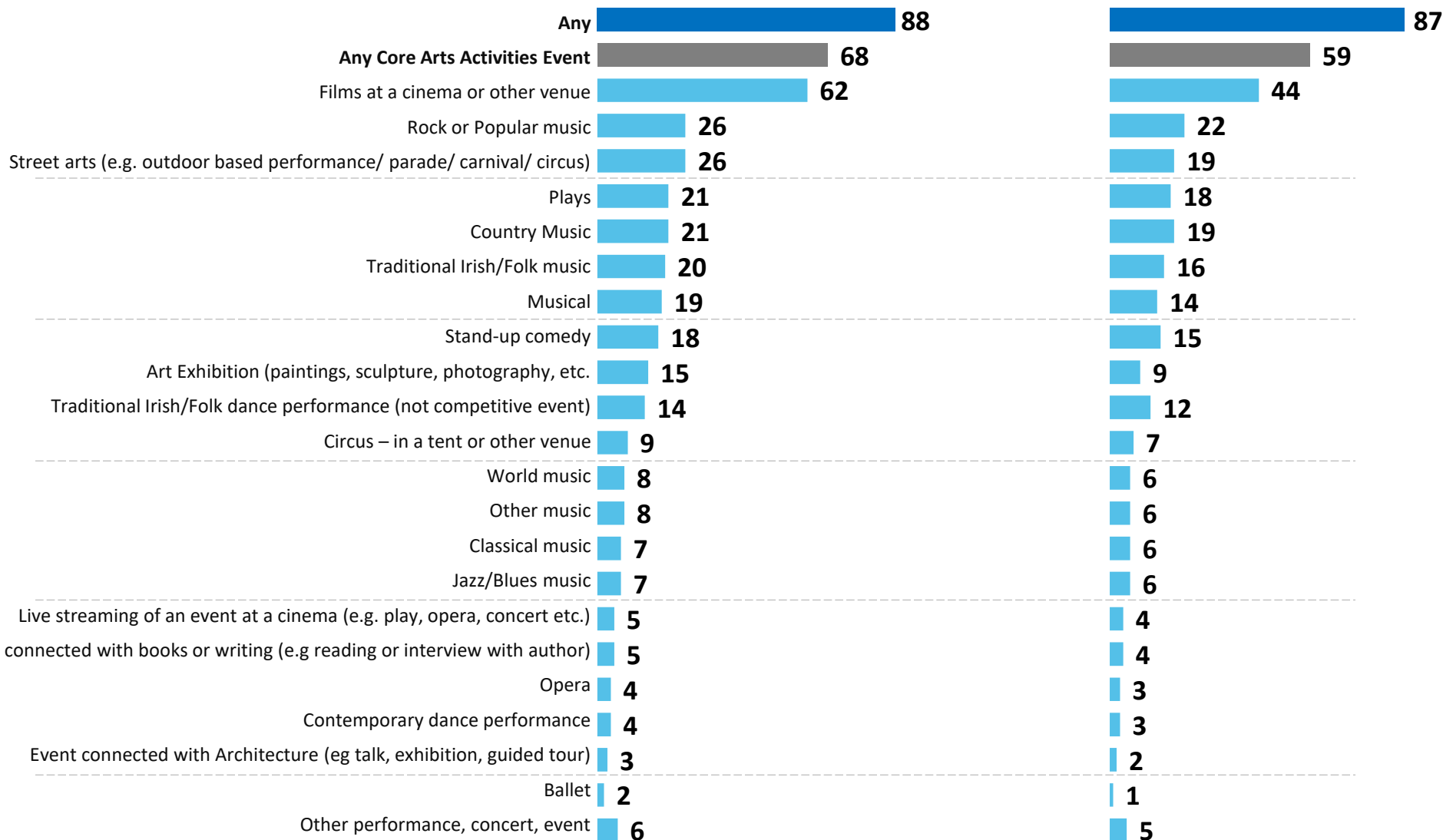
Arts Attendance



Base: Adults aged 16+ n – 1,183

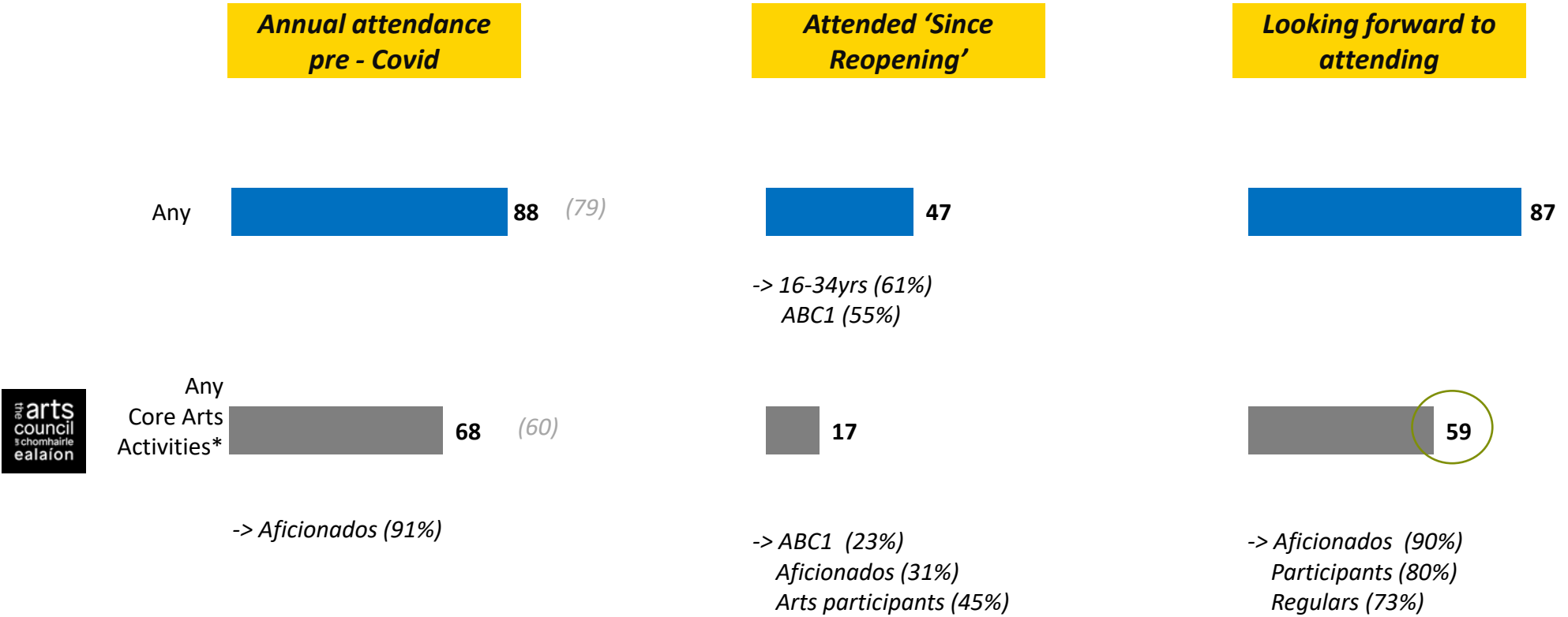
Annual attendance pre - Covid %

Looking forward to attending%



Arts Attendance: Summary

Base: Adults aged 16+ n – 1,183



(2018/19 Arts Insights Average)

59% of Irish adults are 'really looking forward to attending in person again' a core arts activities event.

* Based on events traditionally funded by the Arts Council: excludes films, musicals, stand-up comedy, rock or popular music

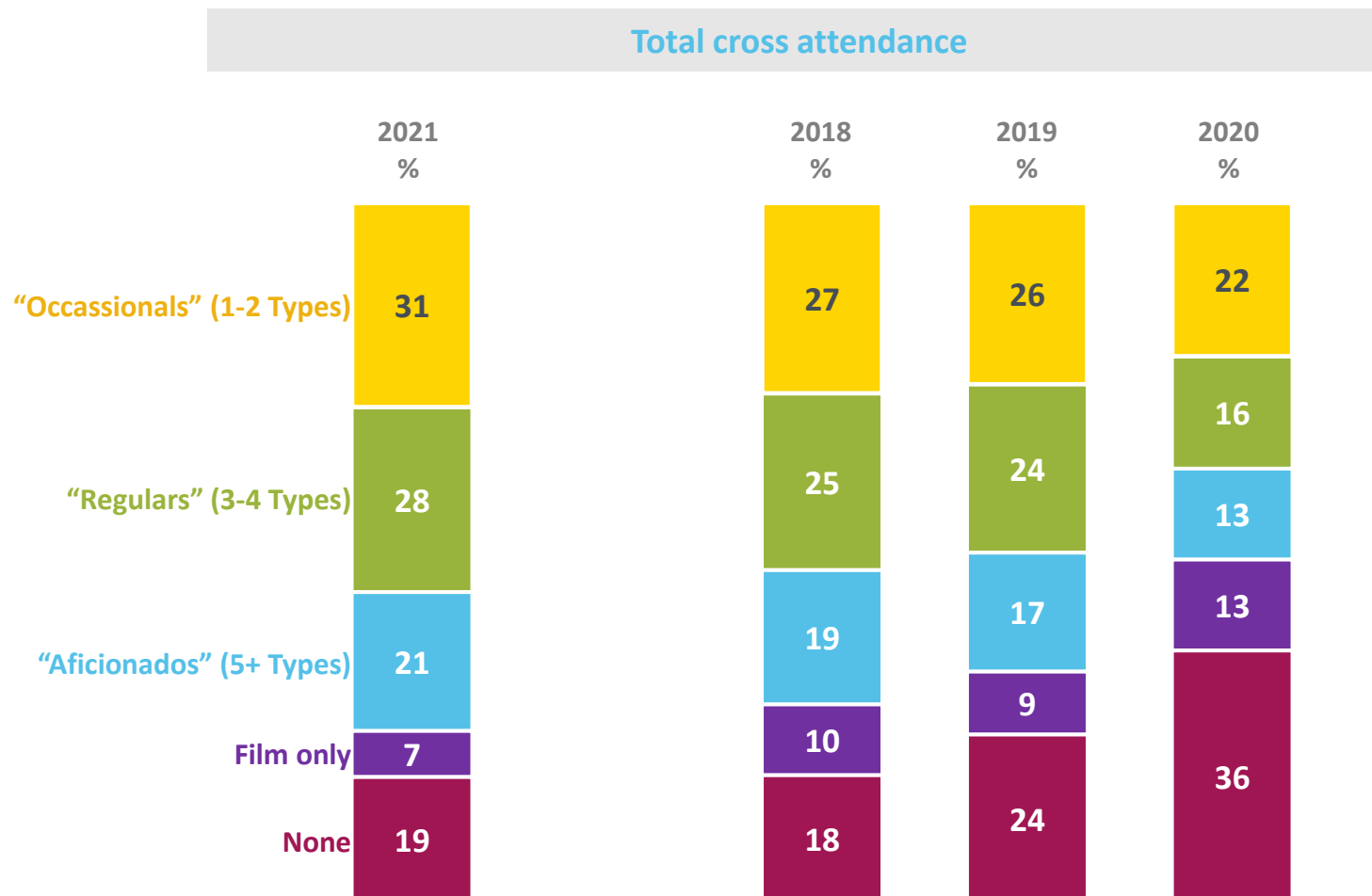
Q.2 Thinking back now to before the start of the Covid crises in Ireland, which if any of the following events would you attend at least once a year outside the home?

Q.3 And which, if any, of these events, have you gone to since re-opening?

Q.4 And which, if any, of these events are you really looking forward to attending in person again?

Arts Insight segments

Base: Adults aged 16+ n – 1,183



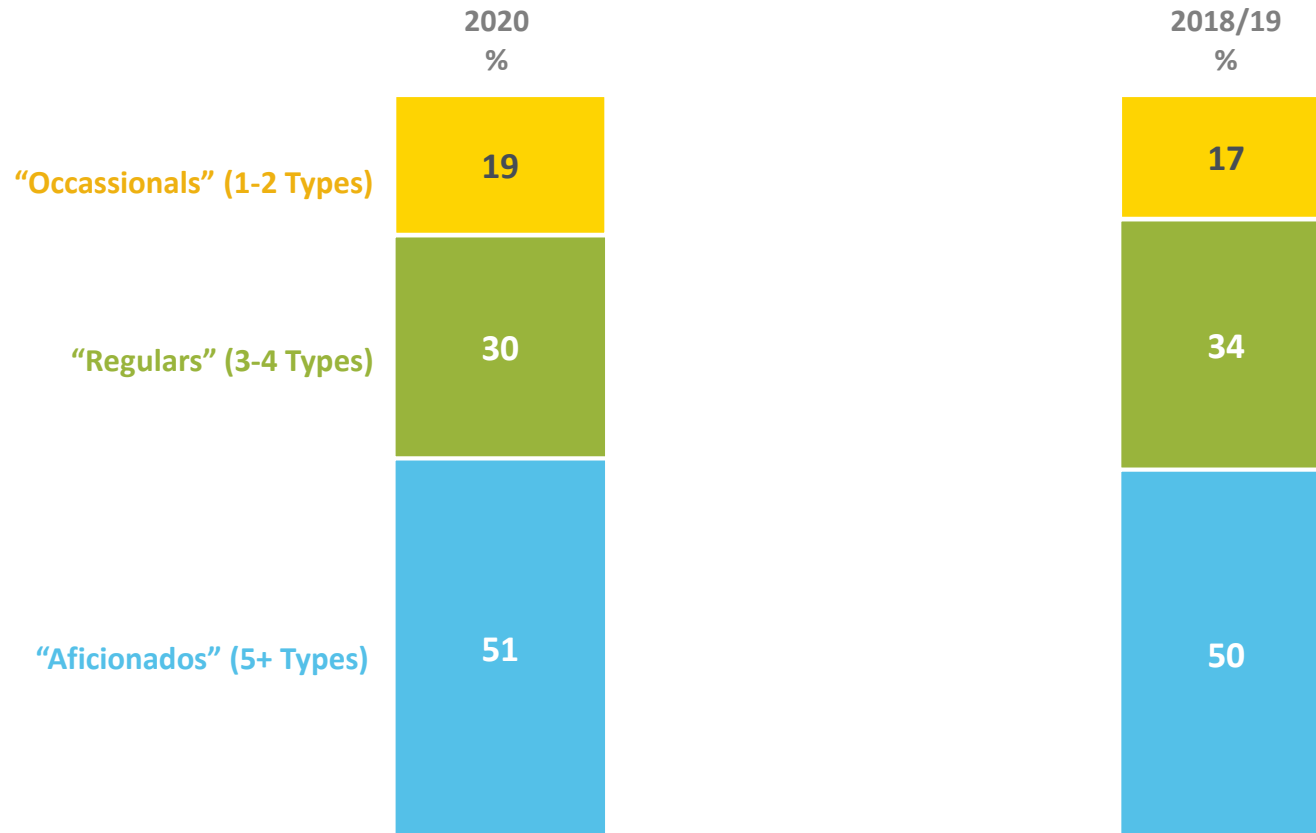
The incidence of the Arts Insight segments in 2021 bears comparison with 2018/19 despite the amended questioning.

Arts Insight segments: Share of Arts Events Attendance 2018 - 2020



Base : All Adults aged 16+ n- 1,262

Share of Arts Events attendance



Aficionados typically account for c. 50% of all attendances.

Arts Insight 2021: Segments Profile

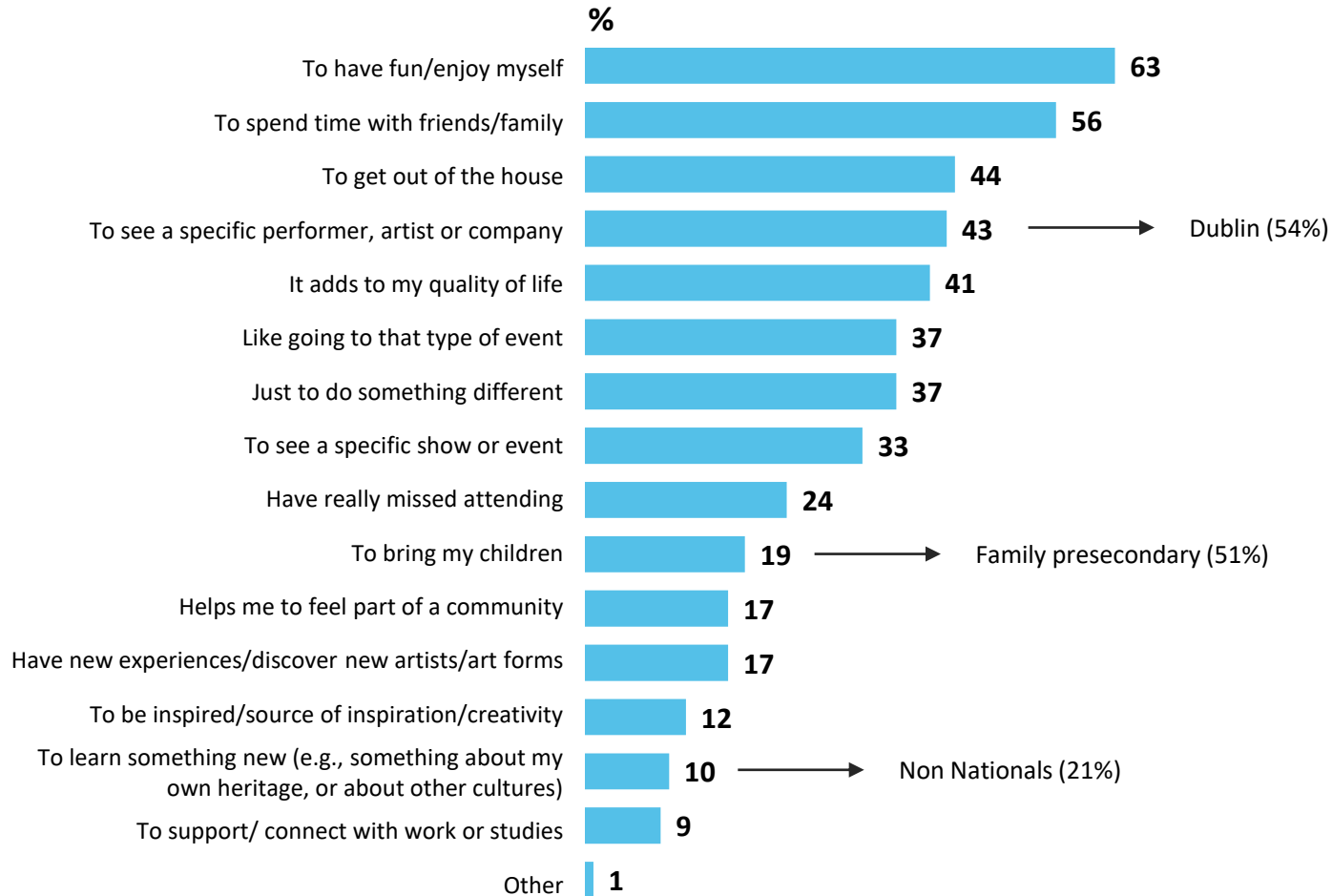
Base: Adults aged 16+ n – 1,183

	Total	Any Arts Goers	Occasionals	Regulars	Aficionados	Films (only)	None
<i>UNWTD</i>	1183	959	336	344	273	89	135
	%	%	%	%	%	%	%
Gender							
Male	49	46	54	47	34	61	60
Female	51	54	46	53	66	39	40
Age							
<34 years	32	33	26	35	39	46	18
35-49 years	29	31	32	29	31	23	18
50+ years	40	36	42	36	29	31	64
Social Class							
ABC1F50+	47	50	45	48	59	48	25
C2DEF50-	53	50	55	52	41	52	75
Region							
Dublin	29	30	20	30	43	31	23
Ex. Dublin	71	70	80	70	57	69	77
RoL	26	27	27	28	24	22	27
Munster	27	26	32	25	17	31	30
Conn/Uls	18	17	20	17	16	17	20
Area							
Urban	85	85	84	82	88	87	84
Rural	15	15	16	17	12	13	16

Aficionados are increasingly exhibiting a bias towards females, ABC1's & Dublin. Those who typically attend Films/ Cinema only peak among those under 35 years; and those who don't attend any events ('None') are much more likely to be over 50 years.

Really looking forward to attending in person again

Base : Looking forward to attending any event in person n – 918 (87%)



Not surprisingly, enjoyment from social interaction is a key motivator for anticipating attending.

Targeted, relationship-based marketing for venues will be vital on re-opening

17% of adults have attended a *core arts activity* event since reopening

This peaks for Aficionados (31%) and especially arts participants (45%)

These groups are also much more likely to be 'really looking forward to attending in person again' a core arts activity event.

Not surprisingly, the enjoyment from social interaction is the key reason for looking forward to attending in person.

Those who typically attend 'Films/ Cinema only' peak among those under 35 years; and those who don't attend any events ('None') are much more likely to be over 50 years.

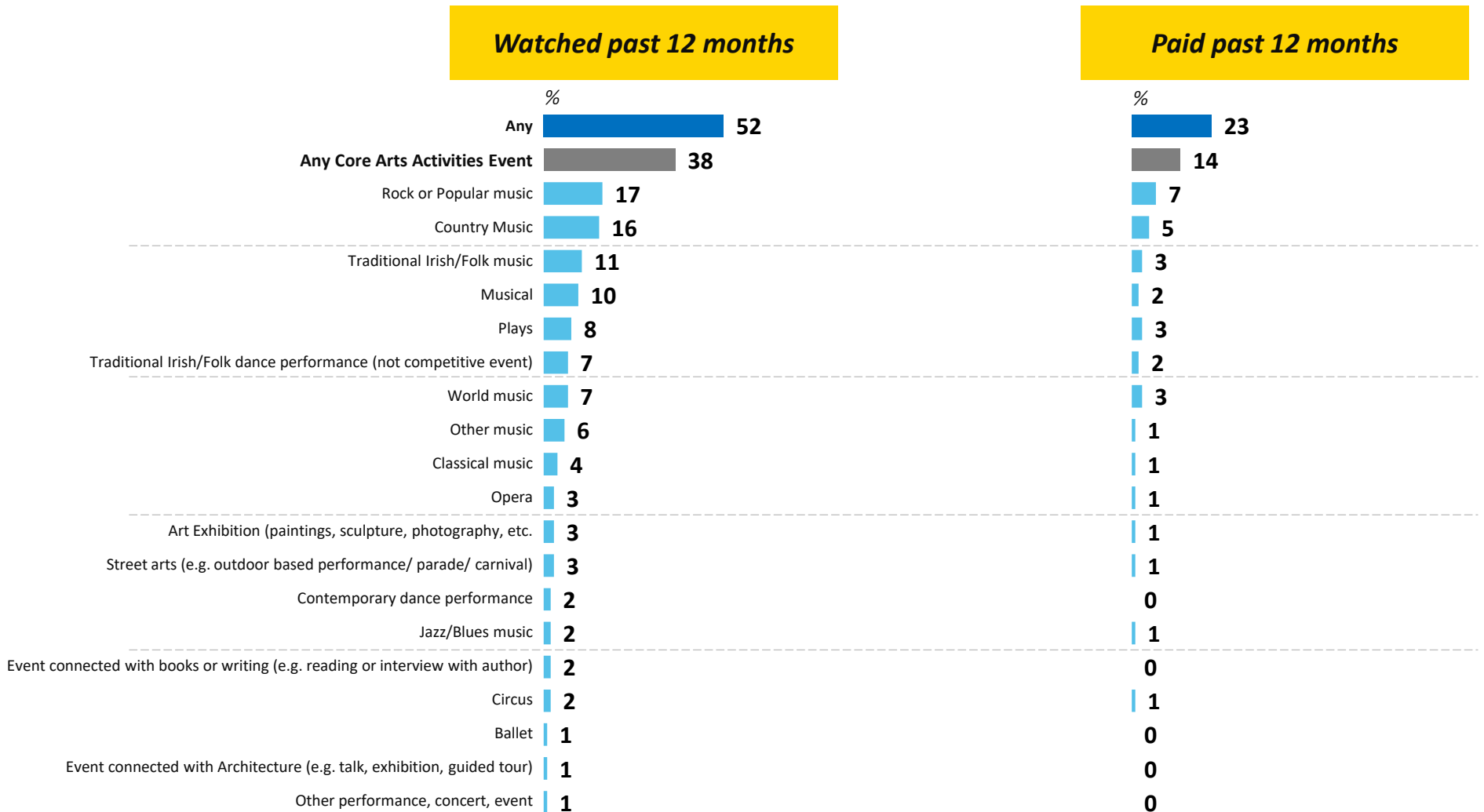


Digital Arts Engagement

Arts Insight 2021

Digital Arts Attendance 2021

Base: Adults aged 16+ n – 1,183



Q.5 And in the past 12 months, which if any of these arts events have you watched on a screen, either on TV or Online (on the internet)?

Q.6 And in the past 12 months, which have you paid to view on TV or Online (on the internet)?

Digital Arts Attendance 2021

Base: Adults aged 16+ n – 1,183

Watched past 12 months

Paid past 12 months



-> ABC1s (59%)
Aficionados (68%)
Regulars (60%)



-> Regulars (31%)
Aficionados (26%)



Any
Core Arts
Activities*



-> ABC1s (45%)
Non-Nationals (53%)
Aficionados (58%)
Regulars (48%)



-> Regulars (22%)
Aficionados (18%)

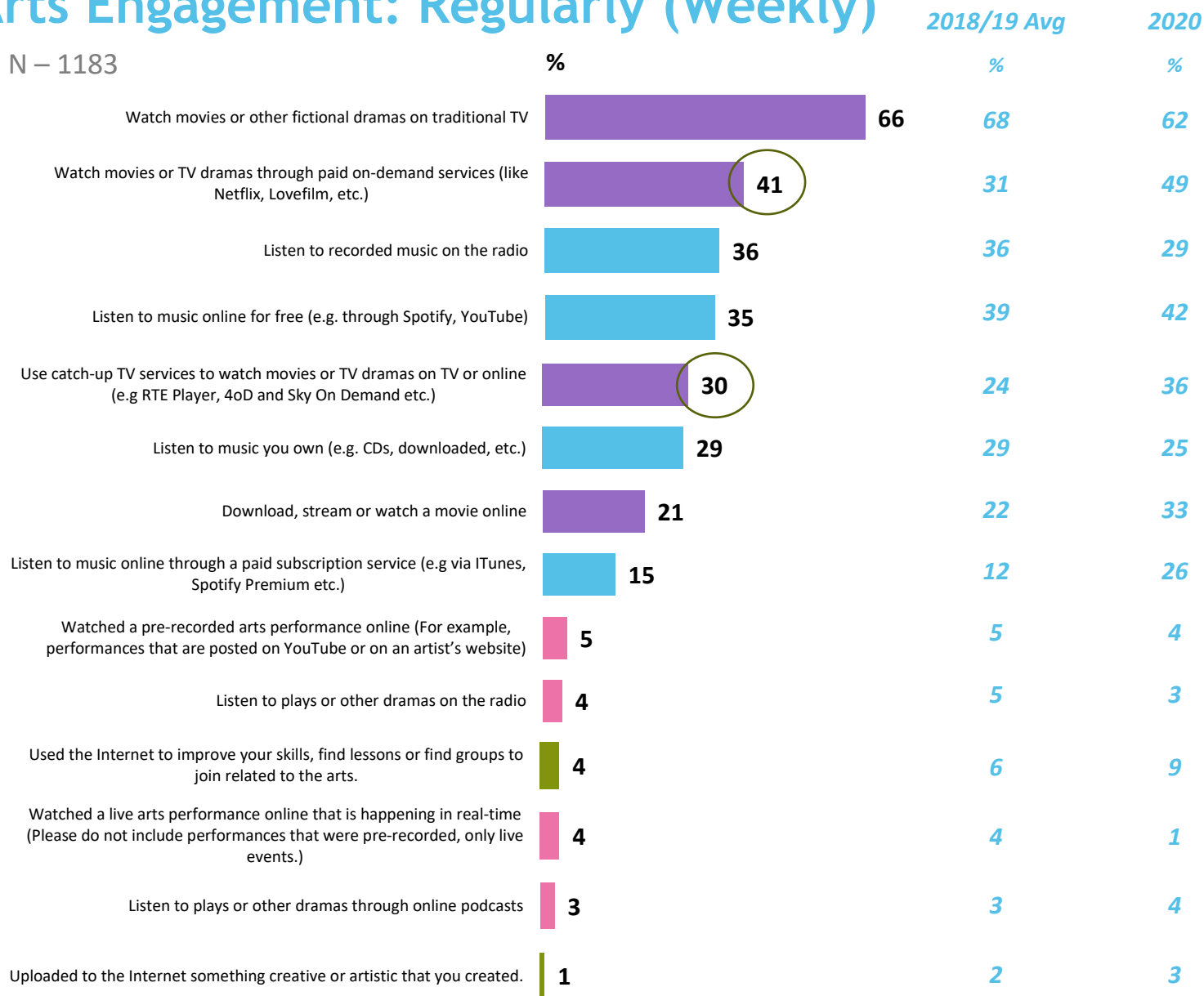
The opportunity/threat from digital arts attendance is very evident: with Regulars and Aficionados most likely to have both watched and paid for in the past 12 months.

* Based on events traditionally funded by the Arts Council: excludes films, musicals, stand-up comedy, rock or popular music

Digital Arts Engagement: Regularly (Weekly)



Base : All Adults N – 1183

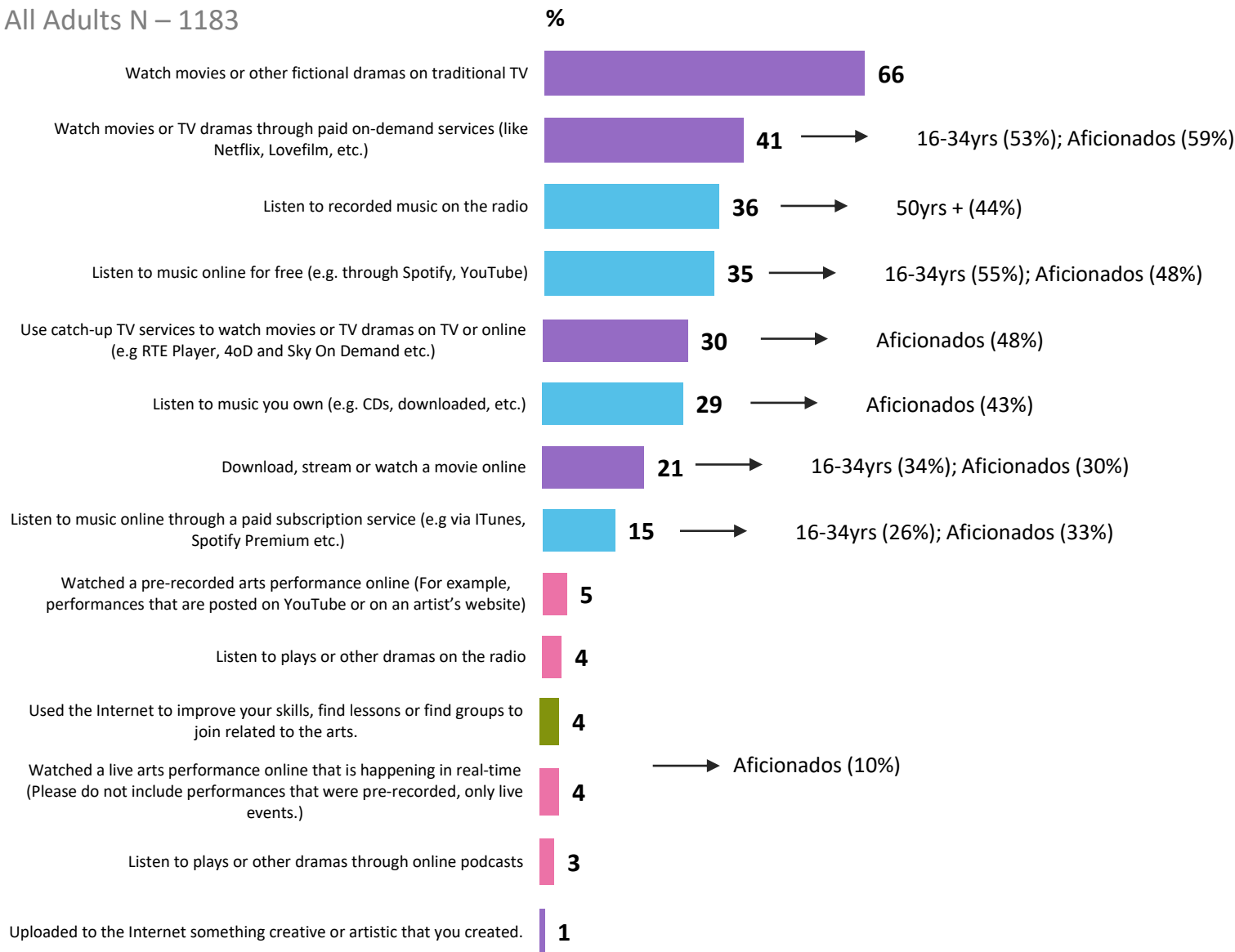


Streaming/ Catch up TV services continue to show significant increases from pre-Covid.



Digital Arts Engagement: Regularly (Weekly)

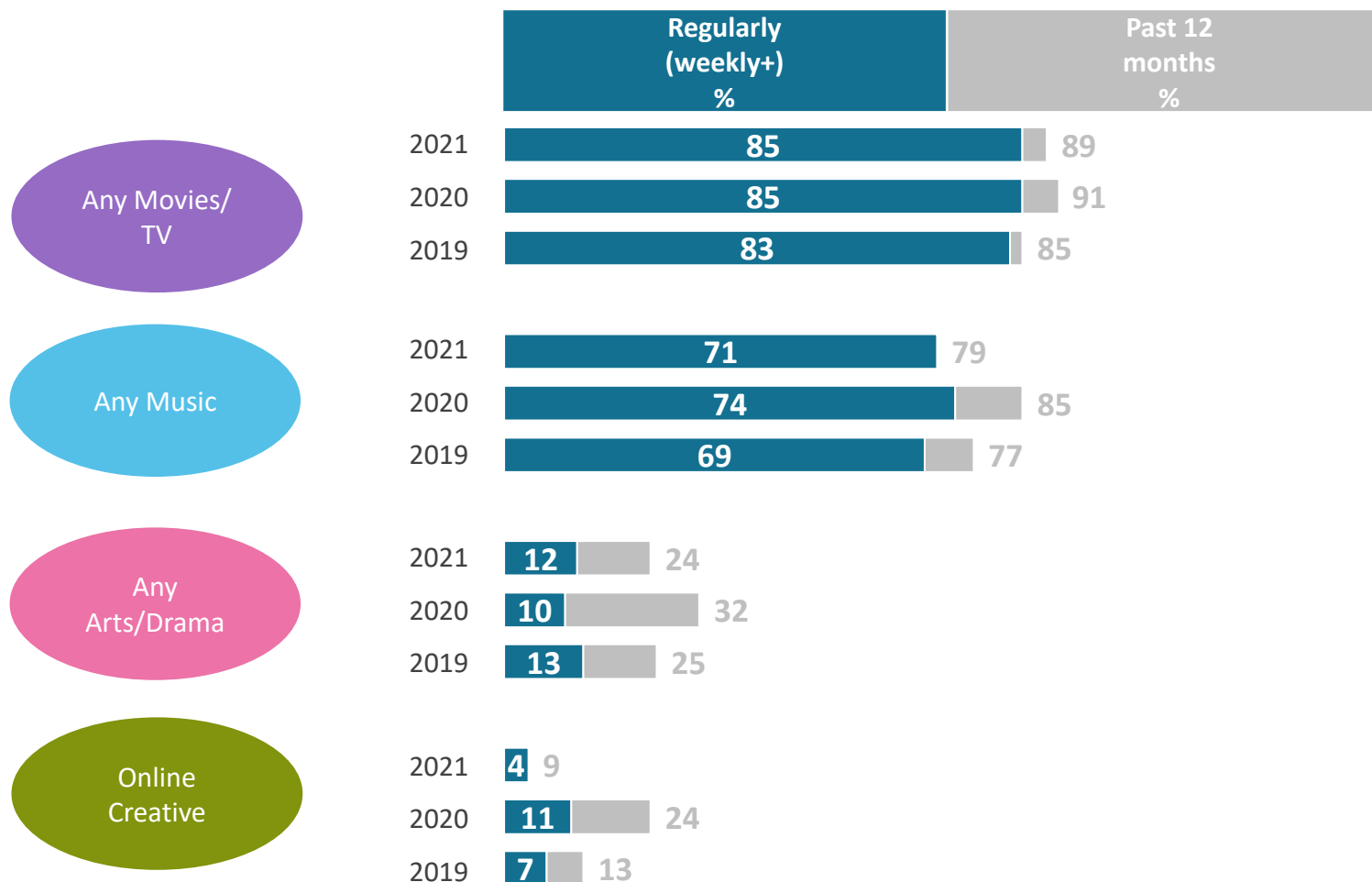
Base : All Adults N – 1183



Weekly digital engagement is driven by -34yrs & Aficionados.

Digital Arts Engagement: Summary

Base : All Adults N – 1183



The summary weekly+ incidence is stable over time despite the Covid dynamic; the exception being the decline in online creative activities.

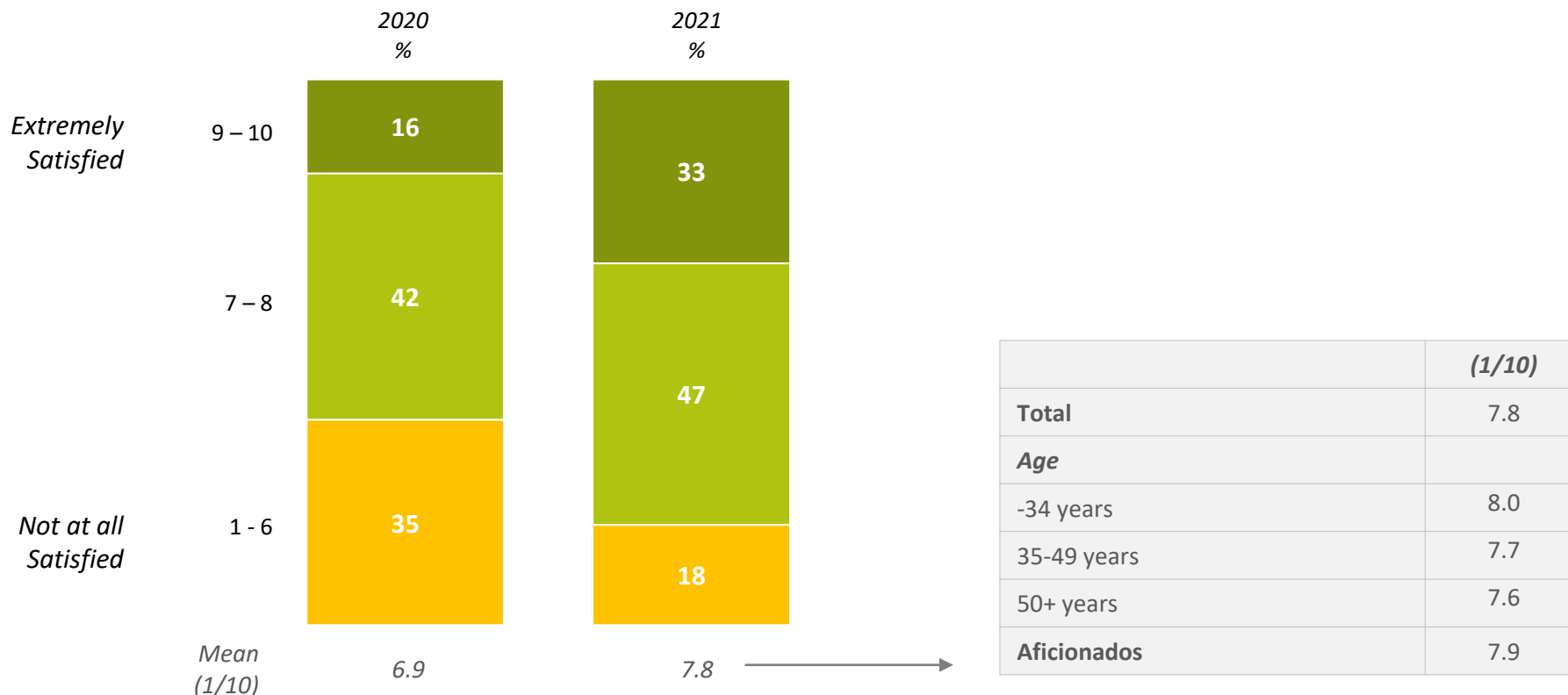
Q.26a Which of these have you done in the past 12 months?

Q.26b And which of these do you do regularly – say at least once a week?

Home engagement with 'Arts + Cultural content': Satisfaction with Online

Base: watch/listen to Arts + Cultural programmes online N - 520

Q. And how satisfied are you with the quality of the arts & cultural content you have watched or listened to Online in the past 12 months? Please rate it on a ten point scale where ten means extremely satisfied and one means not at all satisfied.



Satisfaction with online arts & cultural content has grown significantly with 33% now being extremely satisfied.

Digital Arts Engagement Summary

While digital arts engagement has stabilised, satisfaction has increased.

The opportunity/threat from digital arts attendance is very evident: Regulars and Aficionados most likely to have watched and paid for digital arts in the past 12 months

Streaming & Catch up TV services are the digital formats which have continued to increase from pre-Covid.

While weekly digital usage is strong among the youth market, it peaks across film, music, art & dance for Aficionados.

Satisfaction levels with online arts and cultural content has grown significantly in the past 12 months

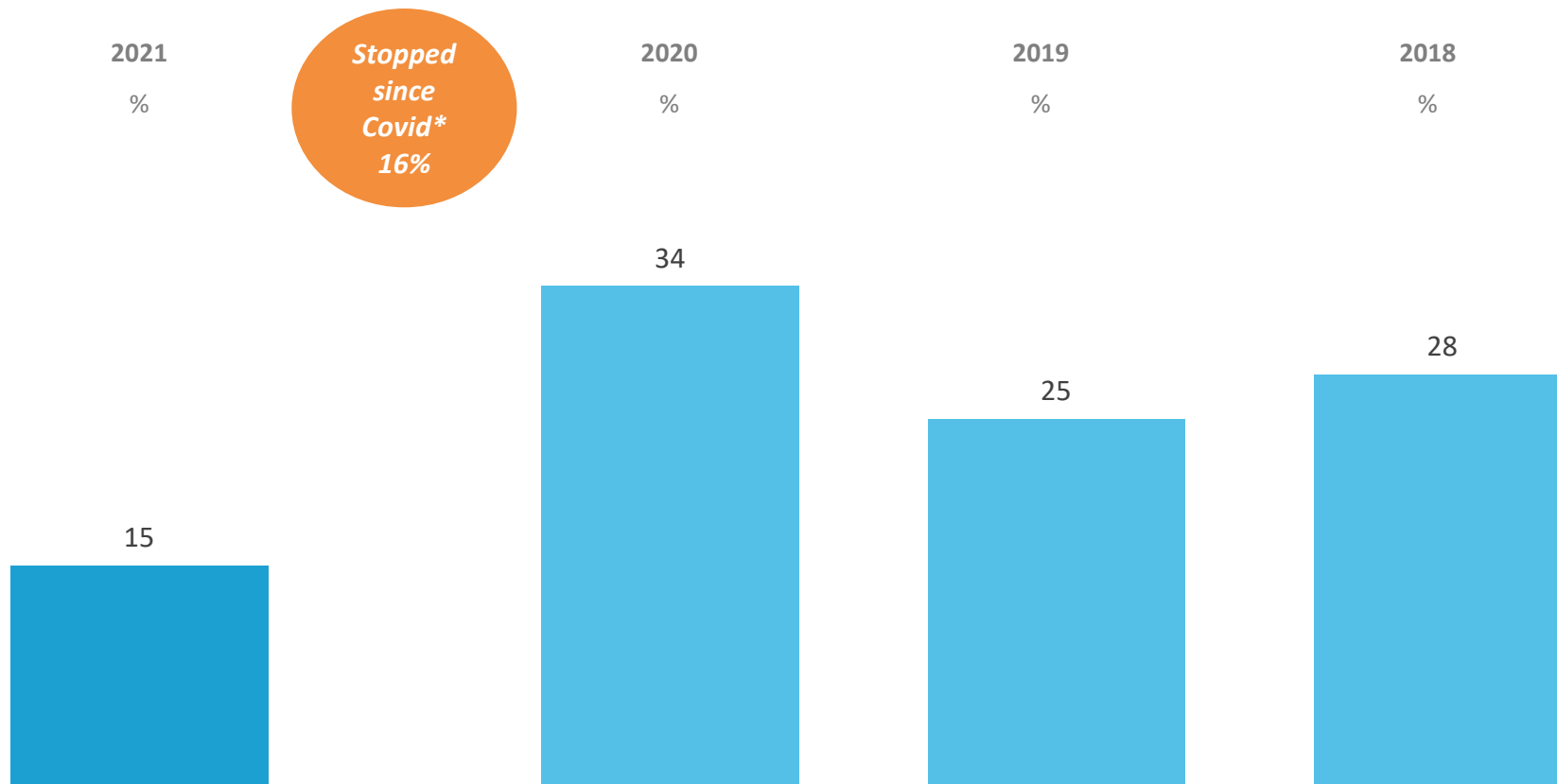


Participating in the Arts

Arts Insight 2021

Participating in the Arts

Base: Adults aged 16+ n – 1,183



An initial increase in arts participation during the pandemic has now retracted significantly.

** Didn't like participating online or wasn't available online.*

Q.15 In the past 12 months, have you taken part in any of the following activities?

Q.16 Which of the following best describes how often you have taken part in ... in the past 12 months? - Singing or being part of a choir

Q16.d Have you stopped participating in any of the following activities since the start of the Covid pandemic?



Participating in the Arts

Base: Adults aged 16+ n – 1,183



2020	2018/19 Avg.	Stopped since Covid
%	%	%
6	5	2
5	7	3
9	7	4
2	4	3
6	7	5
7	4	2
10	6	2
6	5	1
3	3	1
1	1	2
2	3	1
34	27	16

An initial increase in arts participation during the pandemic has now retracted significantly.

Participating in the Arts ‘since Covid’

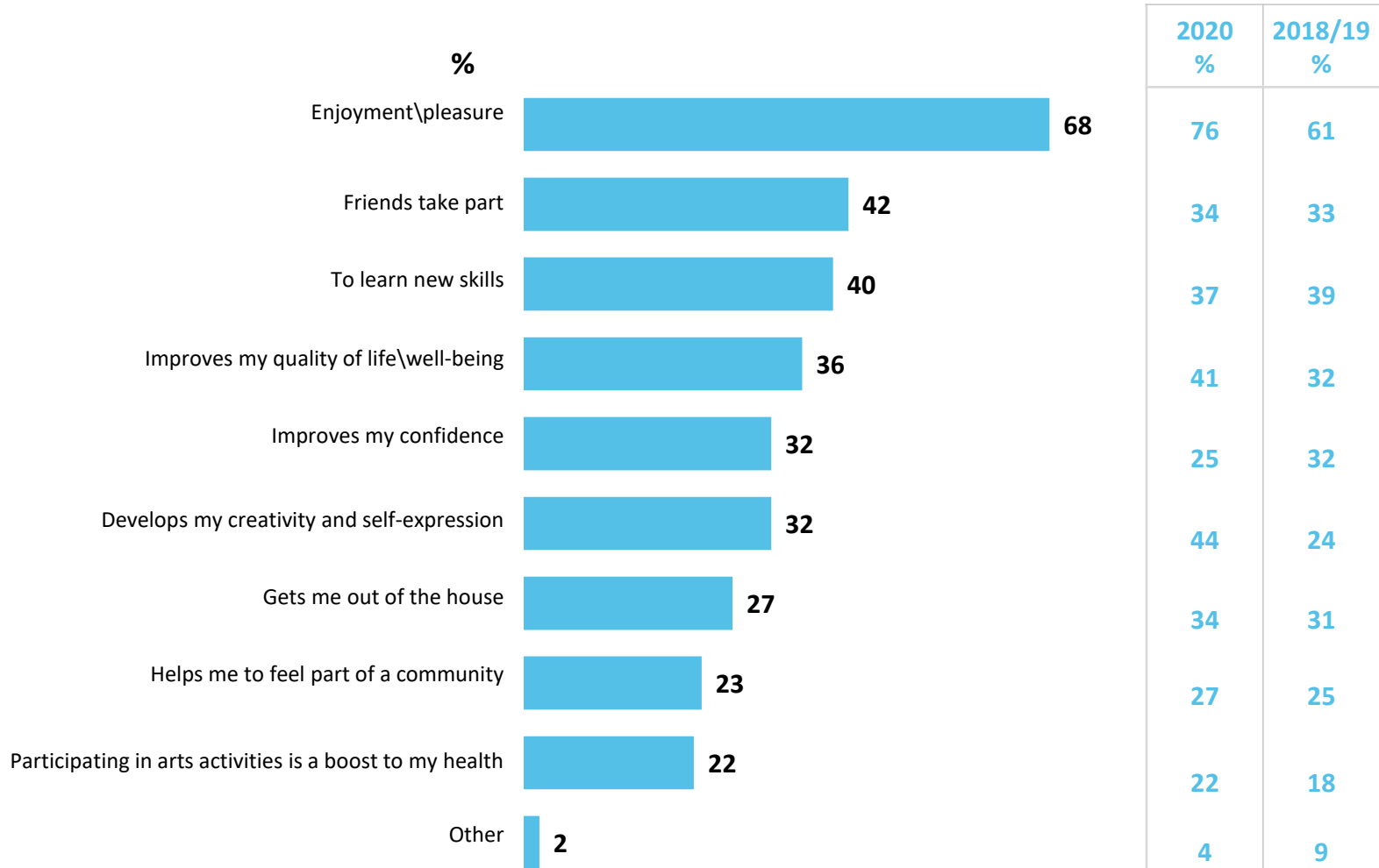
Base: Participation in each activity

	Singing or being part of a choir	Music of any kind.	Drama or theatrical activity of any kind	Dance activity of any kind	Film and video making	Visual arts and crafts	Creative writing	Book Club, reading group	Digital arts	Circus, Street arts, Carnival skills	Other
	39	44	21	39	43	50	34	51	33	12	13
	%	%	%	%	%	%	%	%	%	%	%
Taken part in person	66	69	74	81	56	63	55	43	61	90	70
Taken part online (via the internet)	21	22	17	16	44	31	28	45	35	10	30
Both	13	9	9	4	-	6	16	12	4	-	-
Started for the first time/ or re-started after a break	35	30	16	34	42	20	32	54	37	43	67
Was participating before Covid	65	70	84	66	58	80	68	46	63	57	33

Films video making, and Book clubs show the highest incidence of online participation; and indeed, are the activities most likely to have recruited (or re-started) since Covid.

Reasons for Participation in the Arts

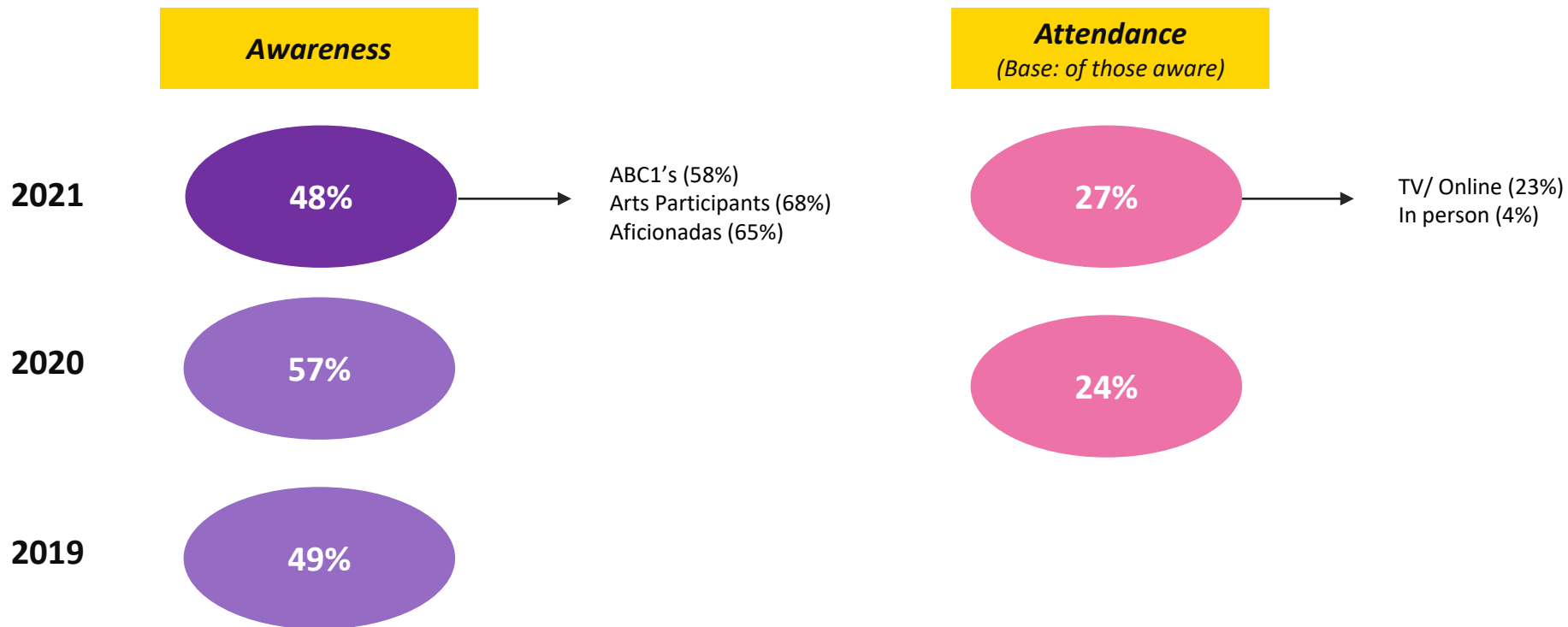
Base: Adults aged 16+ n – 1,183



The motivations associated with ‘friends taking part’ has become much more prominent this year.

Culture Night 2021

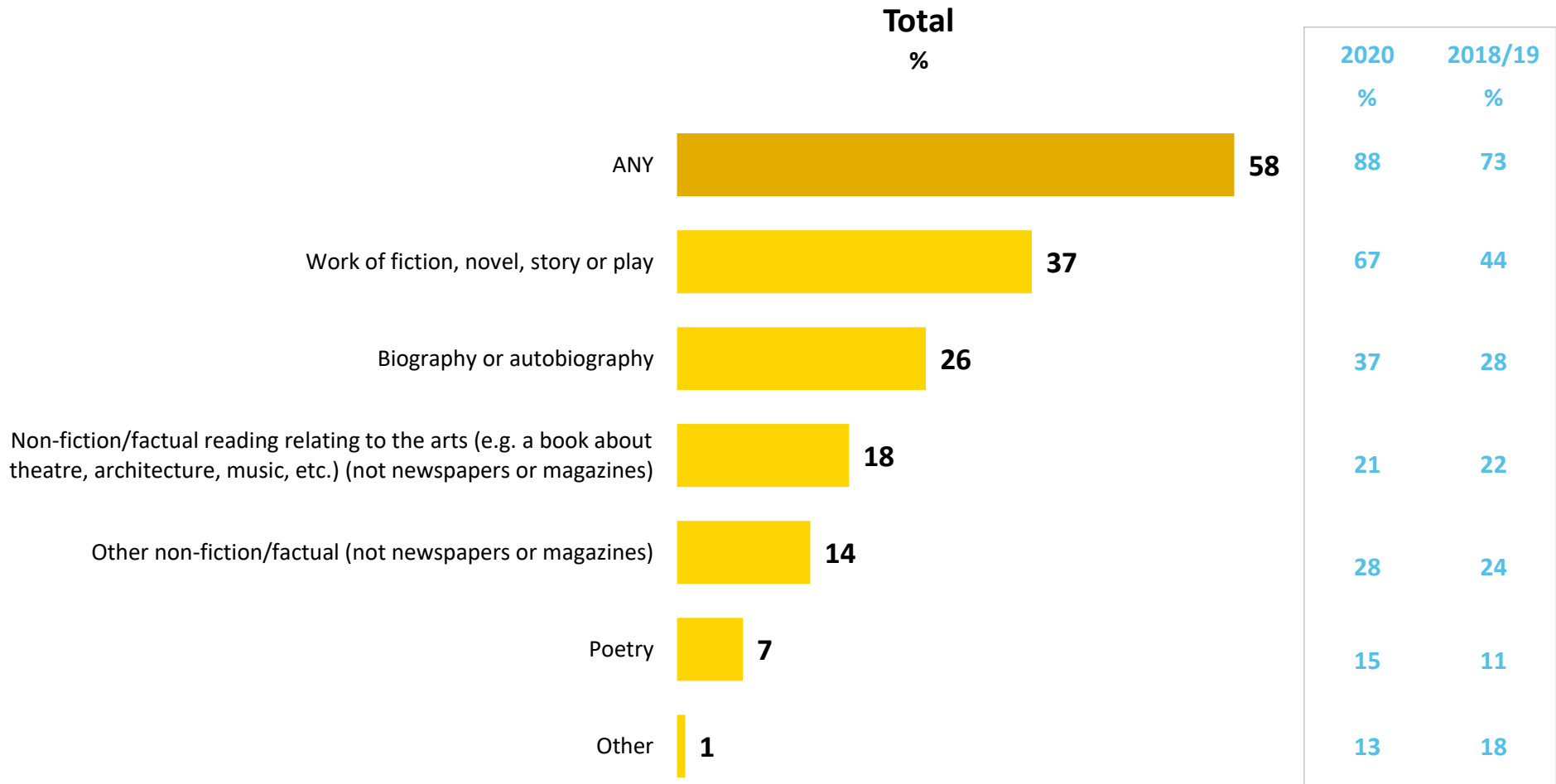
Base : All Adults N – 1183



Awareness for Culture Night in 2021 is just under half of Irish adults, peaking among ABC1's & Aficionadas. Strong conversion of awareness to attendance is again evident with 27% of those aware seeing an event this year.

Reading for Pleasure 2021

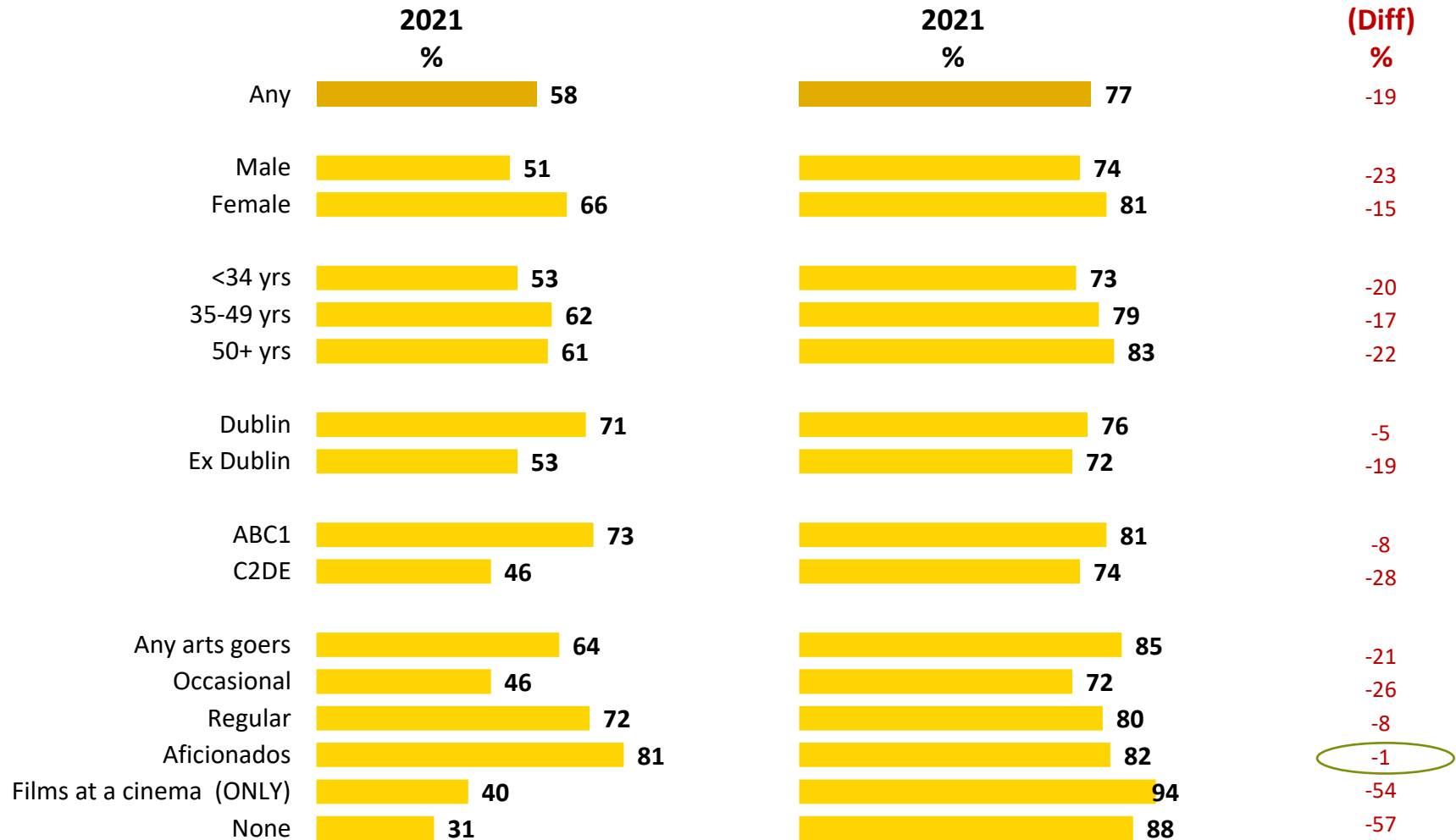
Base: Adults aged 16+ n – 1,183



Reading levels have also retreated sharply, well below Pre- Covid levels.

Reading for Pleasure

Base: Adults aged 16+ n – 1,183



Reading levels among Aficionados , Regulars and ABC1s are largely stable since pre-Covid, elsewhere there are sharp falls.

Frequency of Reading for Pleasure 2021



Base: Adults aged 16+ n – 1,183



Reading frequency has increased across each genre year on year; and has increased on pre-Covid levels for fiction and non-fiction.

Participating in the arts summary

An initial increase in arts participation during the pandemic has now retracted significantly

The decline is evident across all art forms and demographics.

The decline is directly related to dissatisfaction with or non-availability of participating online.

Social motivations ('friends taking part') are again increasing in prominence.

For Culture Night, strong conversion of awareness to attendance is again evident with 27% of those aware seeing an event this year.

Reading levels have retreated; however, those who continue to read have increased their frequency on pre-Covid levels for both fiction and non-fiction.

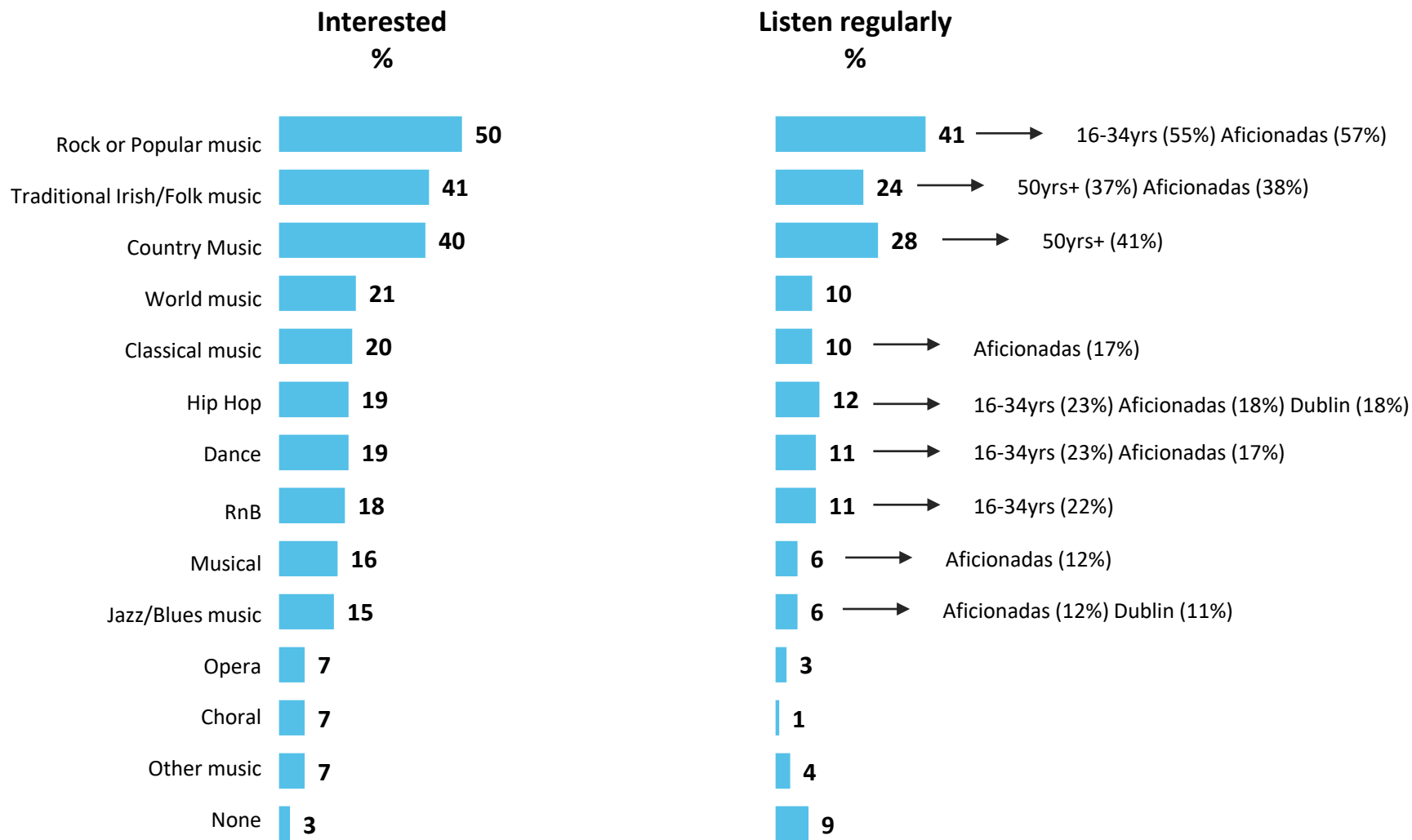


Music

Arts Insight 2021

Music Interests

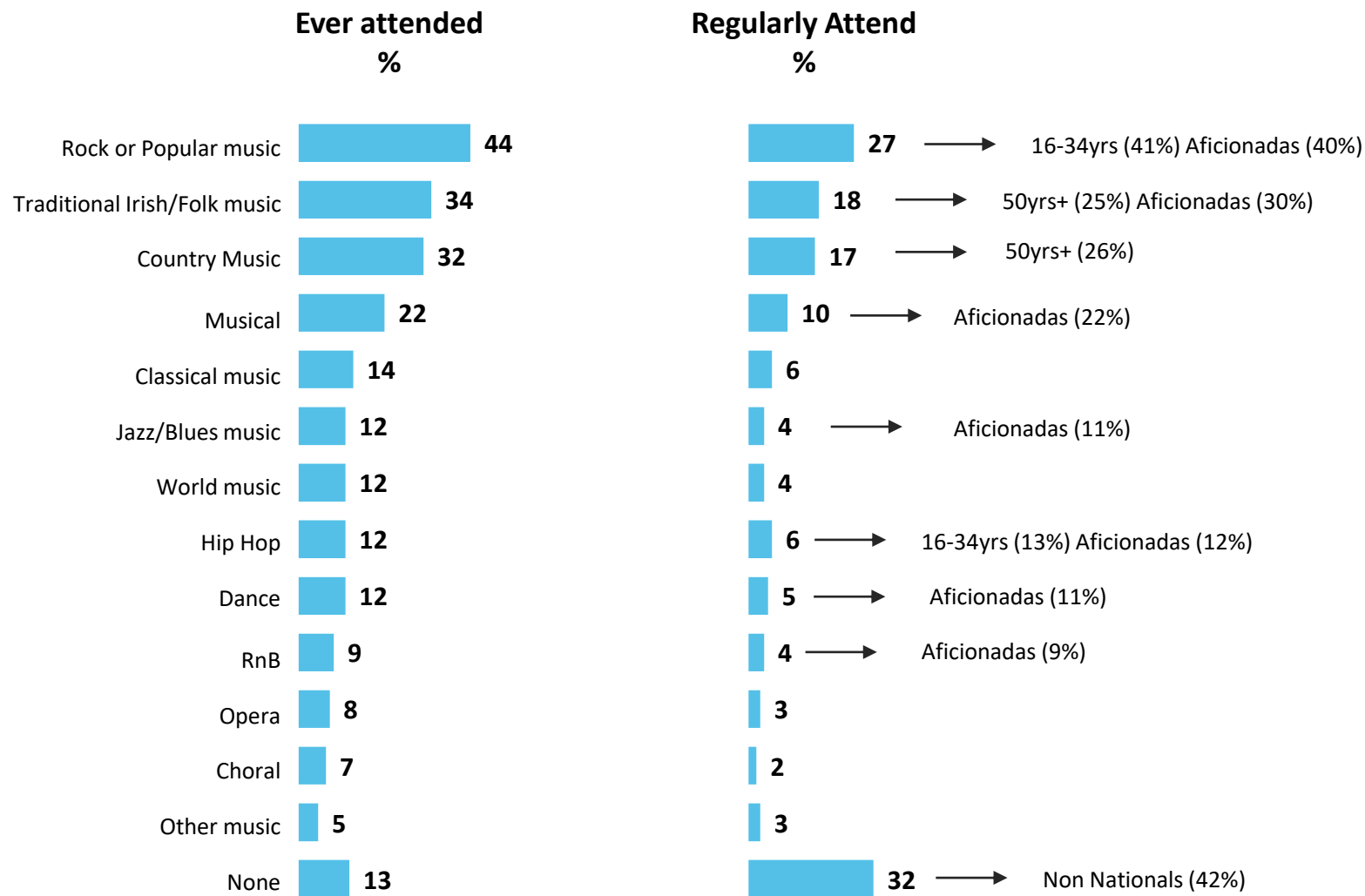
Base: Adults aged 16+ n – 1,183



The results highlight the national appeal of Trad and country music; as well as the strong connection between age and music preference.

Music Attendance

Base: Adults aged 16+ n – 1,183



The prominent role of Aficionadas in regularly attending music concerts is confirmed.

Q.23c And for which, if any, of these types of music have you ever attended a concert/ live performance of?

Q.23d And for which, if any, of these types of music would you regularly attend a concert/ live performance, say at least twice a year? 212936 | The Arts Council | Arts Insight 2021 | Jan 2022

Music: Conversion 'regular listening' to 'regular attendance'



Base: Adults aged 16+ n – 1,183

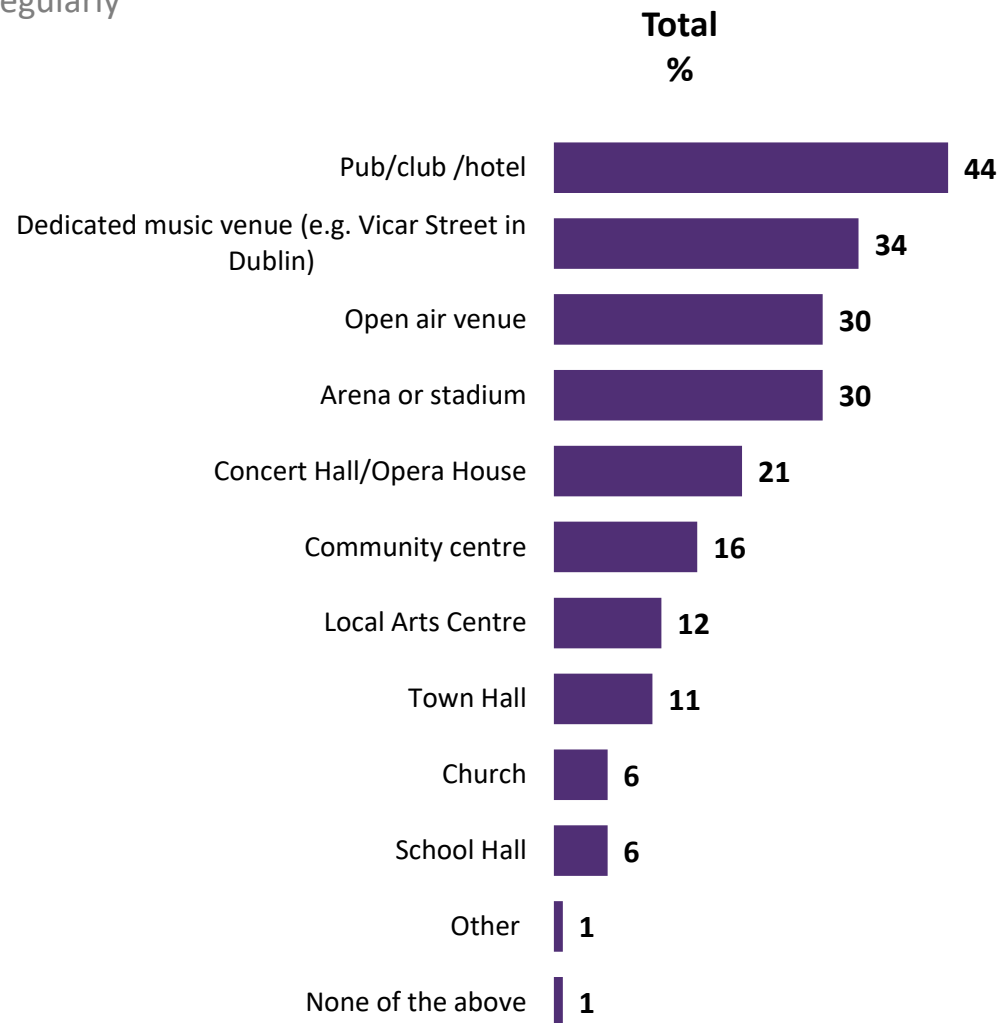
	Listen regularly %	Attend regularly %	Conversion %
Choral	1	2	200%
Musical	6	10	167%
Opera	3	3	100%
Traditional Irish/Folk music	24	18	75%
Other music	4	3	75%
Jazz/Blues music	6	4	67%
Rock or Popular music	41	27	66%
Country Music	28	17	61%
Classical music	10	6	60%
Hip Hop	12	6	50%
Dance	11	5	45%
World music	10	4	40%
RnB	11	4	36%

Adjusted average 57%

Music genres appear equally well served with attendance opportunities; albeit niche groups can seem underserved.

Music venue attended

Base: Music type attended regularly



Pub/club /hotel is the most frequented venue type across all regular attendees - peaking for Trad & country music events

Aficionados and the youth market drive concert attendance

The strong national appeal of traditional Irish/folk and country music is confirmed by the research.

These music genres are also vital in driving the importance of pubs/ clubs and hotels as key music venues.

While music preference and listening format often divides strongly by age, high engagement by Aficionados is evident across genre.

Music genres appear equally well served with attendance opportunities; albeit niche groups can seem underserved.



Attitudes towards Arts

Arts Insight 2021

Cultural value

Art education in schools (e.g. dance, drama, music, etc.) is as important as science education

As much importance should be given to providing arts amenities as is given to providing sports amenities

The arts play an important and valuable role in Irish society

The arts help us express and define what it means to be Irish

Ireland is a creative nation

Diversity

The arts from different cultures give us an insight into the lives of people from different cultures

I cannot afford to attend as many arts events as I might wish

There are equal opportunities for everyone living in Ireland to attend and participate in the arts, (regardless of class, age, ethnicity, disability etc)

Economic Value

The arts in Ireland should receive public funding

The arts in Ireland are underfunded

Ireland's reputation for the arts helps bring visitors and tourists to Ireland

Social value

The arts locally help give my county or region a distinctive identity.

Involvement in the arts makes me feel a stronger connection to where I live

Quality

The quality of professional arts presented in Ireland are on a par with those you would experience in any European country

Personal well-being

The arts make for a richer and more meaningful life

The arts play a significant part in my life

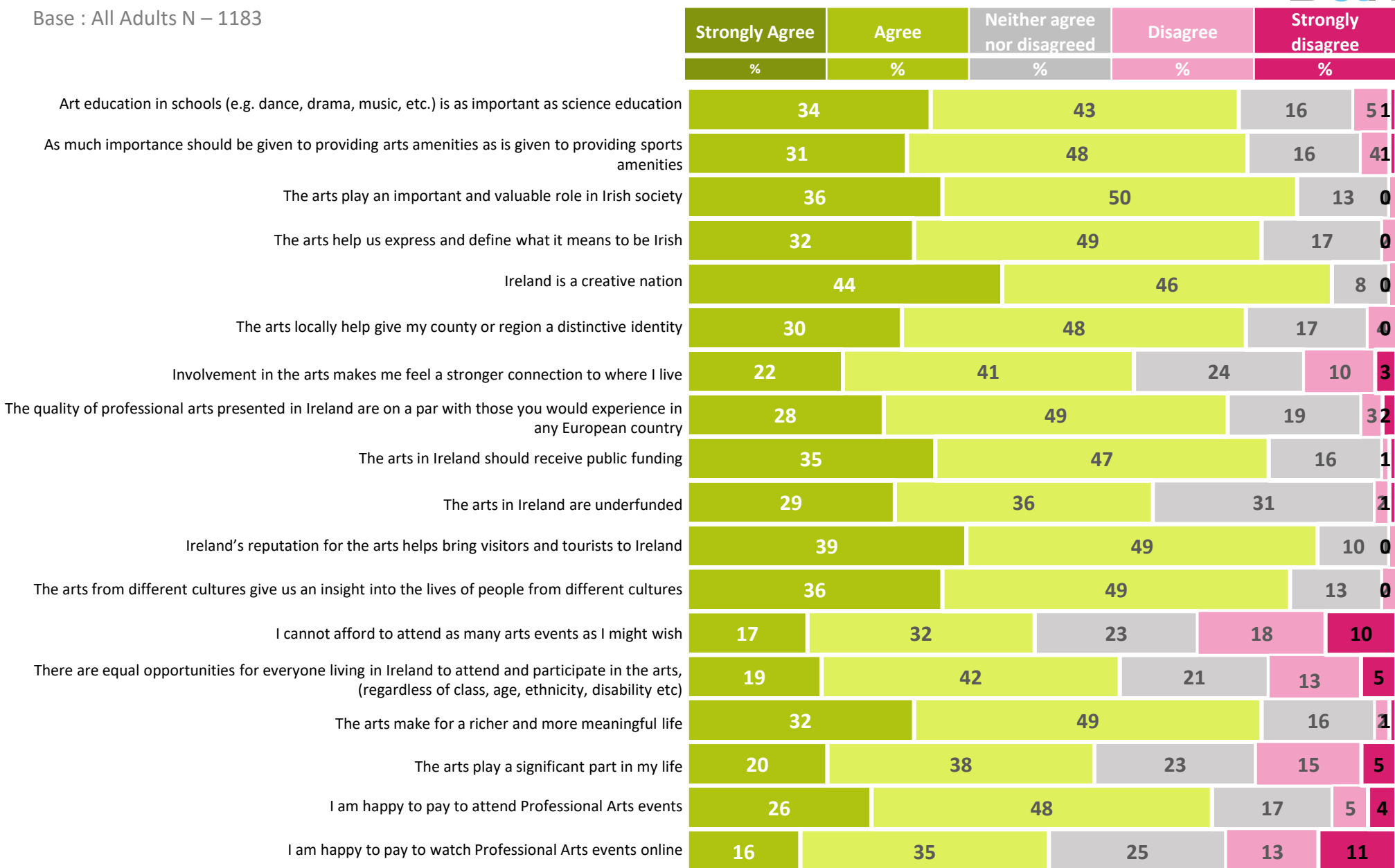
Arts Transaction

I am happy to pay to attend Professional Arts events

I am happy to pay to watch Professional Arts events online

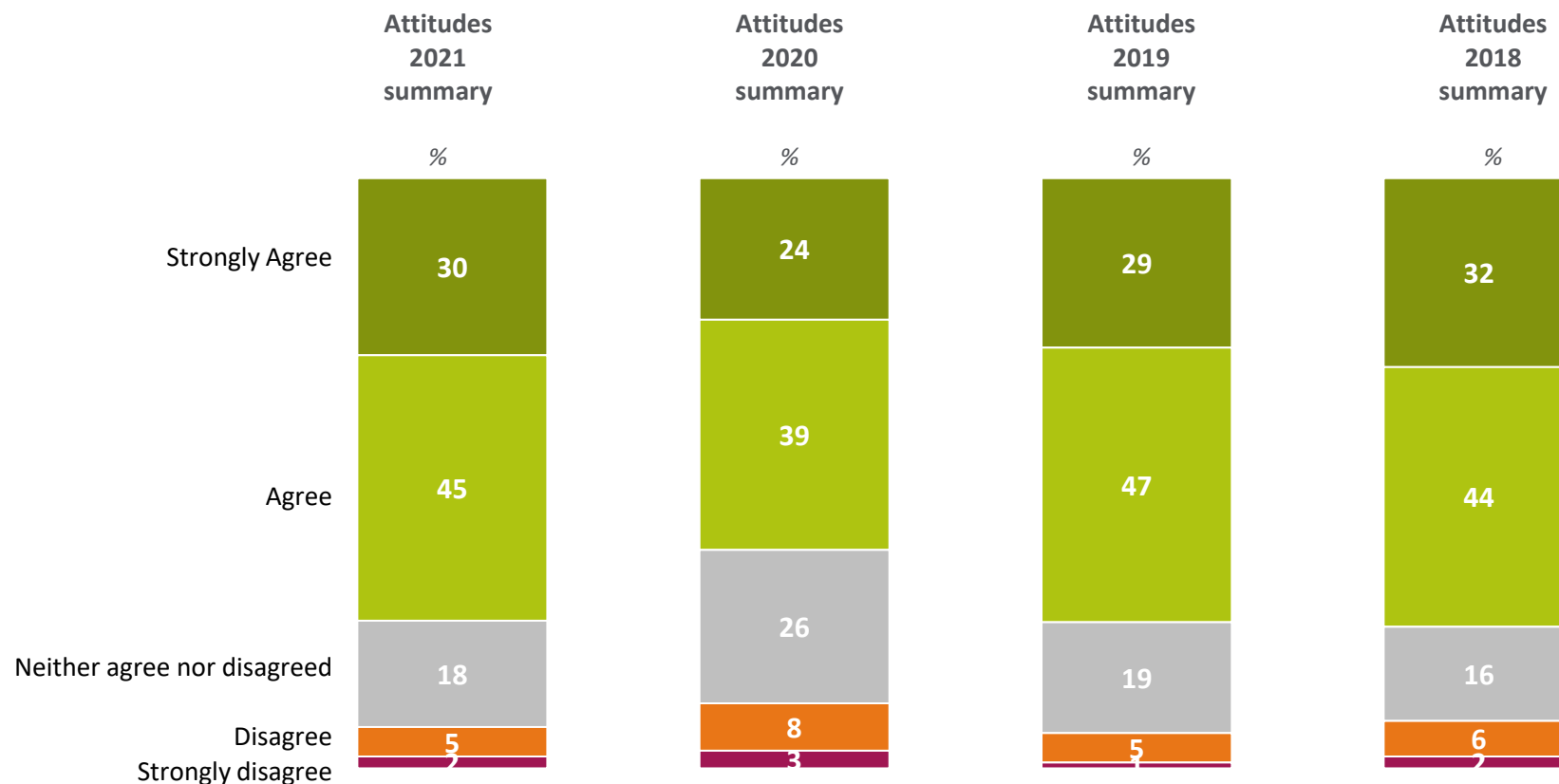
Attitudes towards the Arts 2021

Base : All Adults N – 1183



Attitudes towards the Arts 2021: Summary

Base: Adults aged 16+ n – 1,183



In summary terms, attitudes towards the Arts have strengthened and are comparable with pre-covid levels.

Attitudes towards the Arts 2021

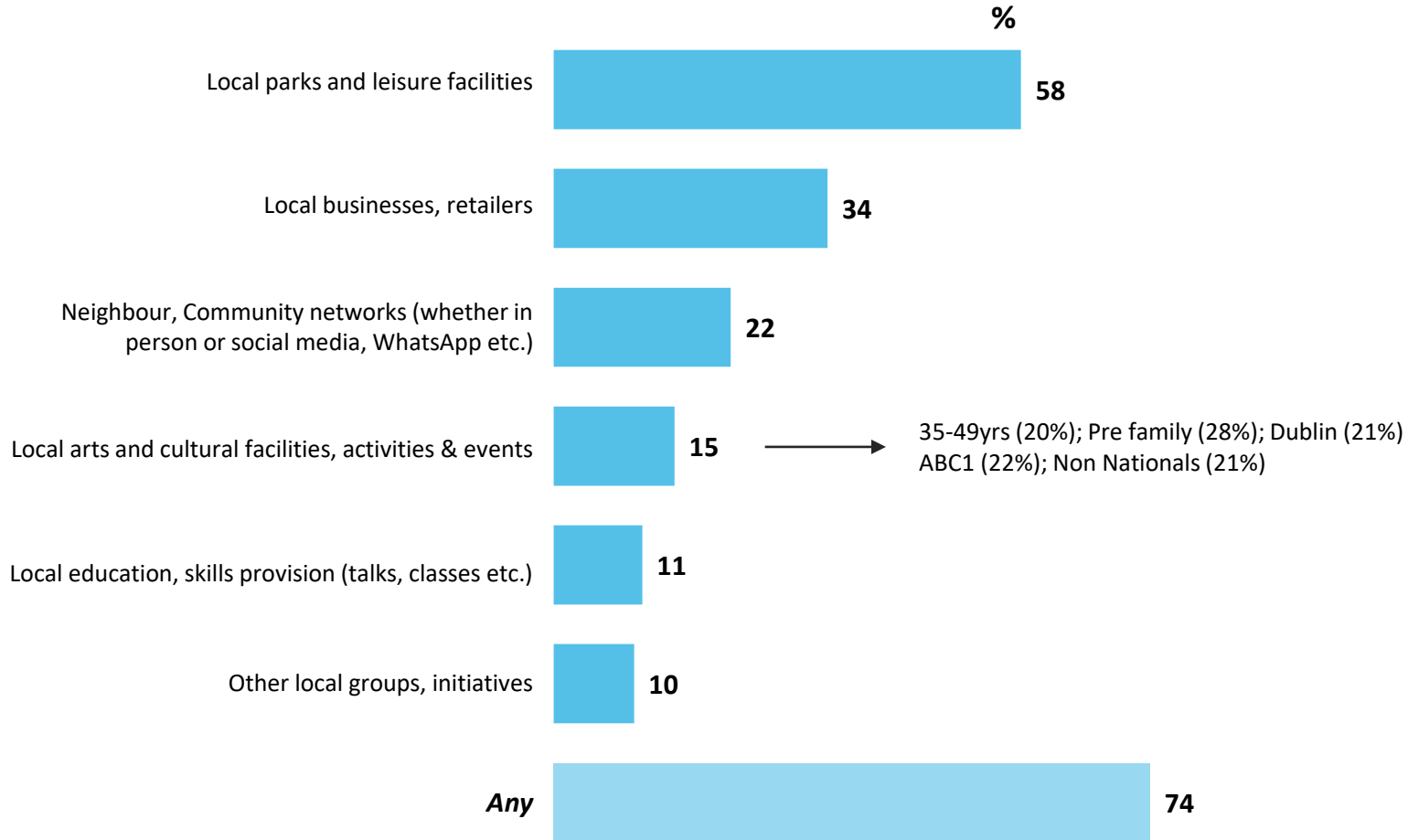
Base : All Adults n - 1183

Strongly Agree
%

		2018	2019	2020
		%	%	%
Ireland is a creative nation	44	39	35	35
Ireland's reputation for the arts helps bring visitors and tourists to Ireland	39	-	34	29
The arts play an important and valuable role in Irish society	36	35	-	29
The arts from different cultures give us an insight into the lives of people from different cultures	36	36	35	31
The arts in Ireland should receive public funding	35	39	32	33
Art education in schools (e.g. dance, drama, music, etc.) is as important as science education	34	36	31	31
The arts help us express and define what it means to be Irish	32	32	29	25
The arts make for a richer and more meaningful life	32	34	30	29
As much importance should be given to providing arts amenities as is given to providing sports amenities	31	36	30	32
The arts locally help give my county or region a distinctive identity	30	-	26	18
The arts in Ireland are underfunded	29	-	26	28
The quality of professional arts presented in Ireland are on a par with those you would experience in any European country	28	-	-	22
I am happy to pay to attend Professional Arts events	26	-	-	10
Involvement in the arts makes me feel a stronger connection to where I live	22	23	21	12
The arts play a significant part in my life	20	21	16	13
There are equal opportunities for everyone living in Ireland to attend and participate in the arts, (regardless of class, age, ethnicity, disability etc)	19	-	23	13
I cannot afford to attend as many arts events as I might wish	17	23	22	16
I am happy to pay to watch Professional Arts events online	16	-	-	10

Local Amenities: Stronger interest since Covid

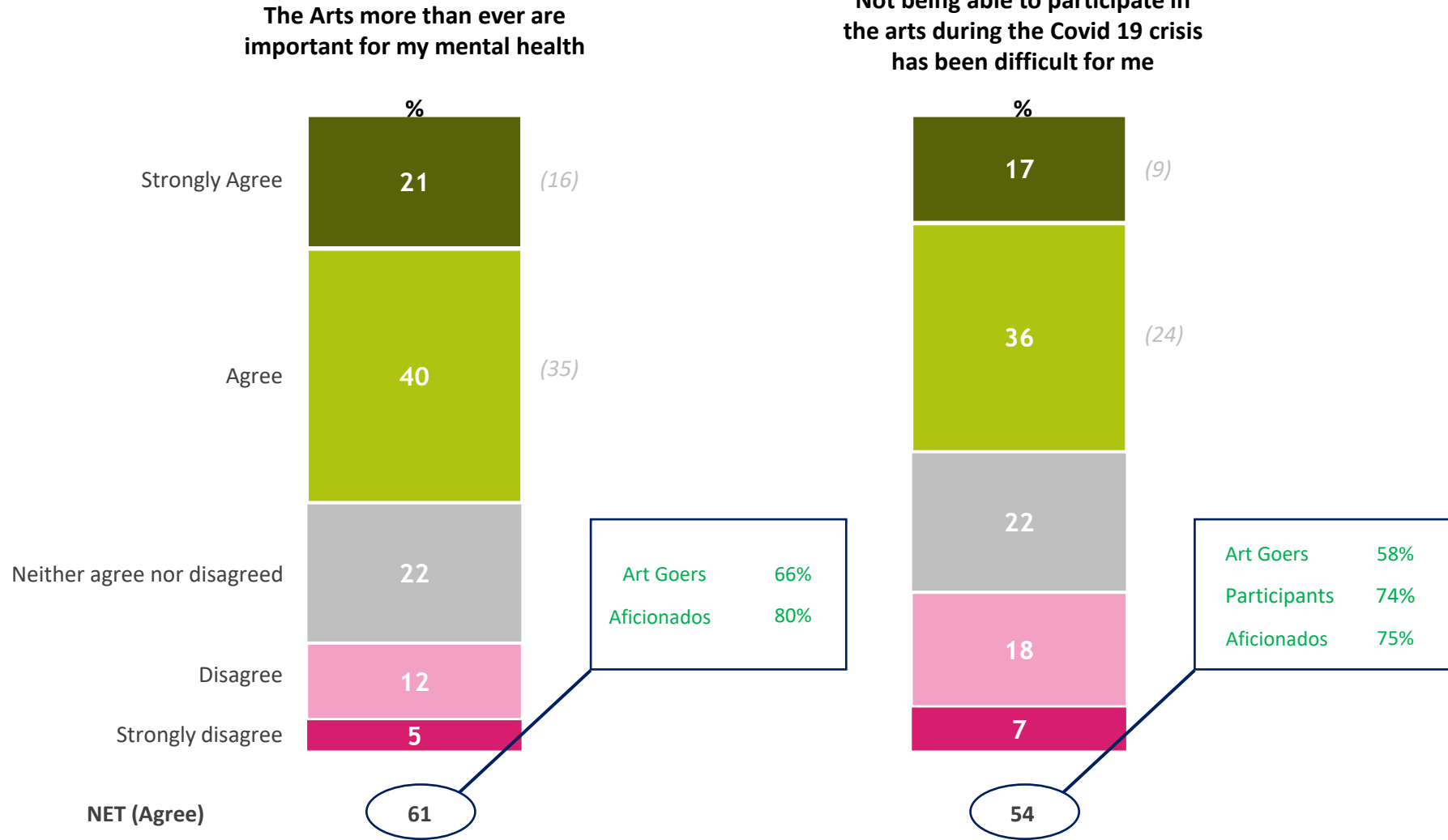
Base: Adults aged 16+ n – 1,183



Those explicitly noting they have taken a stronger interest in local arts and cultural facilities since the pandemic peak in Dublin (21%) and among Non Nationals (21%)

The Arts + COVID 19: Attitudes

Base : All Adults n - 1183



66% of Arts Goers agree that 'the Arts more than ever are important for my mental health'.

(Arts Insight 2020)

Attitudes towards the arts summary

Attitudes towards the arts have strengthened

Attitudes towards the arts strengthened in 2021 and are again comparable with pre-Covid levels.

The past 12 months saw us better recognising the positive role the arts play in our local and cultural communities.

We are also again more likely to link our reputation for the arts as a benefit for tourism.

Those explicitly noting they have taken a stronger interest in local arts and cultural facilities since the pandemic peak in Dublin (21%) and among New Nationals (21%)

66% of Arts Goers agree that 'the Arts more than ever are important for my mental health'.



Summary and Conclusions

1.

Targeted, relationship-based marketing will be vital for venues on re-opening as Aficionados and arts participants will drive ticket purchases following re-opening. Venues need to facilitate the anticipated enjoyment from social interaction.

2.

The opportunity/threat from digital arts attendance is very evident: weekly digital usage peaks for Aficionados across film, music, art & dance; and satisfaction with online arts and cultural programmes is growing. There is likely a pressing challenge to recruit new audiences.

3.

The decline in arts participation is directly related to dissatisfaction with or non-availability of participating online. The prominence of social motivations bode well for returning once re-opened.



4.

The decline in reading levels may be harder to confront; albeit online books clubs appear to have adapted as well as any participant format in the pandemic.

5.

For Culture Night, strong conversion of awareness to attendance is again evident with 27% of those aware seeing an event this year.

6.

Music communications are especially challenging with preference and listening format typically strongly divided by age. As stands genres appear equally well served with attendance opportunities.

7.

Attitudes towards the arts strengthened in 2021 and are again comparable with pre-Covid levels. The past 12 months saw us better recognising the positive role the arts play in our local and cultural communities.

Thank you.



RESEARCH
& INSIGHT

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Delve Deeper